

1998

OREGON NURSERY  
and  
GREENHOUSE  
  
SURVEY

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## **FOREWORD**

September 1999

Oregon's nursery industry continues to shine in an otherwise depressed agricultural economy by generating record sales of \$532 million in 1998, an increase of 8 percent from 1997. Sales of all types of plant materials were higher, but most of the increase was in sales of containers, balled and burlapped, and greenhouse plant materials. Bare root and "other" categories registered more moderate gains.

The data included in this publication originate from two surveys-the Horticulture Census of the U.S. and a Nursery Survey of smaller producers conducted by the Oregon Agricultural Statistics Service. This effort was undertaken to minimize the response burden imposed on Oregon Nurseries and avoid duplication of effort.

The Horticulture Census involved a complex questionnaire sent to all known nursery operations in the U.S. with sales of more than \$10,000 per year. A complete Horticulture Census report providing detailed production and sales for specific types of plants and flowers will be released in early 2000.

The 1998 data in this publication are limited to the sales by plant material type and county of production. Subsequent annual Oregon Nursery surveys will include more detailed data including hired labor questions, distribution of U.S. sales and export data. Funds for the Oregon Nursery survey are provided through USDA's National Agricultural Statistics Service. This funding was originally sponsored by the Oregon Congressional delegation at the urging of the Oregon Association of Nurserymen.

I would like to thank Oregon's Nursery growers for their cooperation, and look forward to returning to a more "normal" data collection effort beginning next year.

Sincerely,

s/Homer K. Rowley  
State Statistician

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## TABLE OF CONTENTS

	Page
1998 Summary.....	1
Gross sales by plant material .....	1
Number of operations, acreage and gross sales by county.....	2
Gross sales by sales value.....	3
Data collection procedures.....	3
Number of operations and survey sampling by sales value .....	3
Sample Questionnaire - 1998.....	4,5

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### 1998 sales up \$40 million from 1997

Oregon's nursery and greenhouse industry had another excellent year in 1998 by establishing yet another record high sales total of \$532 million. This marks the eighth consecutive year of record sales. Sales in 1998 gained 8 percent from 1997 and were 69 percent higher than in 1990, the first year of the survey. The Nursery and Greenhouse industry again solidified its place atop all Oregon agricultural commodities by claiming the top ranking for the sixth consecutive year and was in fact \$167 million above second ranked cattle and calves, which generated sales of \$365 million. All grass seeds, with a value of \$346 million, ranked third and all hay came in fourth with a value of \$343 million.

Forty three percent of the \$40 million sales increase was attributed to container sales and twenty five percent of the increase was for greenhouse products. Balled and burlap products also showed a strong gain. All categories of sales were higher in 1998.

Clackamas County, with sales of \$128.5 million, was \$8.5 million above Marion County sales of \$120.0 million this year. For the past several years, Marion and Clackamas have traded the top ranking. It is very clear that they are the top producing counties as they account for 47 percent of all Nursery and Greenhouse production in the State. Washington County is the third largest producer with sales of \$97.1 million and Yamhill county is fourth with sales of \$83.0 million. The fifth largest county of production is Multnomah with sales valued at \$32.4 million. The top five counties account for 87 percent of all production in the State.

### Nursery/greenhouse gross sales: By plant material 1991 - 1998

	Gross Sales								
Plant material	1991	1992	1993	1994	1995	1996	1997	1998	<u>1998</u> 1997
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	Percent
Bare Root	93,230	84,500	82,400	84,300	82,900	97,600	105,400	109,700	104
B & B	56,910	53,000	52,200	58,500	67,800	75,000	77,800	85,500	110
Container	106,570	109,800	108,400	133,900	148,100	148,900	171,300	188,500	110
Greenhouse	58,170	68,400	79,800	77,200	83,500	91,800	95,800	105,900	111
Other	26,120	29,300	24,200	31,100	36,700	34,700	41,700	42,400	102
Total	341,000	345,000	347,000	385,000	419,000	448,000	492,000	532,000	108

1  
Nursery/Greenhouse 1998

Oregon

### Number of operations: Acreage and gross sales by county, 1996 - 1998

	Number of operations	Acres <sup>1/</sup>	Gross sales			
	1998	1997	1996	1997	1998	1997/1998
	<i>Number</i>	<i>Acres</i>	<i>000 Dollars</i>	<i>000 Dollars</i>	<i>000 Dollars</i>	<i>Percent</i>
Benton	46	400	1,700	1,900	1,800	95
Clackamas	459	11,700	103,500	112,200	128,500	115
Curry	22	500	2,700	3,200	3,400	106
Deschutes	36	160	1,600	1,900	1,800	95
Douglas	50	450	5,200	5,600	5,500	98
Jackson	59	120	1,800	2,200	2,300	105
Josephine	46	150	2,200	2,600	2,500	96
Klamath	10	520	3,700	4,600	6,000	130
Lane	145	500	12,000	14,000	13,700	98
Lincoln	23	170	2,800	2,700	2,700	100
Linn	76	250	5,100	5,000	5,200	104
Marion	349	8,100	98,300	114,300	120,000	105
Multnomah	205	2,900	32,400	32,200	32,400	101
Polk	39	900	6,500	6,200	6,000	97
Umatilla	17	670	3,600	3,200	3,400	106
Washington	259	5,100	86,600	93,500	97,100	104
Yamhill	92	4,700	71,600	77,800	83,000	107
Other <sup>2/</sup>	149	840	6,700	8,900	16,700	188
Total	2,082	38,130	448,000	492,000	532,000	108

1/ Not collected for 1998.

2/ Contains counties with less than 1 million dollars of sales and other counties which were combined to avoid disclosure.

Oregon Nursery/Greenhouse  
1998

2

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### Gross sales, by sales value, 1994 - 1998

Sales size group	Gross sales					
	1994	1995	1996	1997	1998	<u>1998</u> <u>1997</u>
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Less than \$20,000	8,850	10,000	6,700	8,700	7,600	87
\$20,000 - \$99,999	20,450	18,800	18,100	18,500	17,500	95
\$100,000 - \$199,999	23,800	22,000	18,900	20,000	19,600	98
\$200,000 - \$499,999	40,600	46,800	36,000	38,500	44,700	116
\$500,000 - \$1,999,999	95,900	109,000	121,500	134,300	135,900	101
More than \$2,000,000	195,400	212,400	246,800	272,000	306,700	113
Total	385,000	419,000	448,000	492,000	532,000	108

### 1998 Data collection

The 1998 Oregon Nursery and Greenhouse Survey was designed to collect data for all commercial nurseries, greenhouses, and producers of other plant material, such as roses, holly, bulbs, sod, cut flowers, dried flowers, etc. in the state. A stratified random sample of 768 names was selected from the state of Oregon's list of licensed nurseries and greenhouses for 1998. They were classified into six broad size groups based on sales volume. The Oregon Agricultural Statistics Service floriculture survey was used to supplement the list for those firms in the industry who are not required to have a state nursery license.

Questionnaires were mailed to the sampled names on June 21, 1999, followed by a second request on July 13. All non-respondents were phoned or visited from July 27 to August 10. The annual Oregon Nursery Survey was limited to a sample of producers with annual sales of less than \$10,000. Data for firms with sales of more than \$10,000 were taken from the Census of Horticulture, a complex questionnaire asking for detailed information on plant and flower sales. Comparable data on sales of plant material were extracted from that survey to avoid redundant contacts with producers. The complete Horticulture Census will be released in early 2000.

The sample design was developed by the National Agricultural Statistics Service. Computer editing and summary programs were written by Kent Hoddick of the Oregon Staff. Data for minor counties and items were combined with other totals to avoid disclosure of individual operations.

### Number of operations and survey sampling 1997 & 1998

Sales size group	Number of operations		Operations in sample	
	1997	1998	1997	1998
Less than \$20,000	1,292	1,342	204	202
\$20,000 - \$99,999	341	337	169	163
\$100,000 - \$199,999	131	129	131	129
\$200,000 - \$499,999	111	113	111	113
\$500,000 - \$1,999,999	125	118	125	118
More than \$2,000,000	40	43	40	43
Total	2,040	2,082	780	768

3

Oregon Nursery/Greenhouse 1998

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## OREGON NURSERY AND GREENHOUSE SURVEY - 1998

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Dear Nursery/Greenhouse Grower:

The nursery and greenhouse industry continues to gain prominence in Oregon as the state's leading agricultural industry and nationally as a leading state in production and value. Please take a few minutes to complete the annual Nursery and Greenhouse Survey which is the only source of measuring annual growth and change of Oregon's major agricultural industry. The survey is voluntary and your individual data will be kept confidential. The nursery/greenhouse report will be released in September 1999 and is used extensively by your industry, universities, the legislature and local governments for informed decision making concerning issues affecting both the industry and Oregonians in general.

Sincerely,

Homer K. Rowley

Please make corrections to name, address and zipcode if necessary.

State Statistician

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## SECTION 1 - INTRODUCTION

1. Did you produce, sell, or have growing any nursery or greenhouse crops (including container grown), bulbs, sod, bedding plants, cut flowers, holly, dried flowers, etc. during 1998?

**YES** - Please go to Section 2. **NO** - Please go to page 2, Section 3.

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## SECTION 2 - GROSS SALES VALUE

2. What were your gross (invoice) sales from your nursery and greenhouse operation for each of the following plant material categories, and in total during 1998? If calendar year data are not available, please use the most recent fiscal year period. (Exclude plant material purchased for immediate resale.)

	1998 GROSS SALES  (IN DOLLARS)
a. Bare Root	311
b. Balled and Burlapped	312
c. Container	313
d. Greenhouse	314
e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.)	315

f. TOTAL (Should equal a + b +c + d + e)	310
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Continued ----->

## SECTION 2 - NURSERY ACRES OPERATED (cont.)

3. List the Oregon county or counties where your nursery or greenhouse acreage is located. If your acreage is in more than one county, list each county separately, with the dollar value or percent of gross sales by county. (**Exclude acreage located in other States.**)

	1998 GROSS SALES		
COUNTY	DOLLAR VALUE	PERCENT OF GROSS SALES	OFFICE USE
_____ +	611	621	601
_____ +	612	622	602
_____ +	613	623	603
_____ +	614	624	604
<b>TOTAL</b> (Acres should equal total in item 3g above) =	615	<b>100%</b>	

**Go to Section 4**

## SECTION 3 - CHANGE IN OPERATOR

4. Has this operation been sold, rented out, or turned over to someone else?

**YES** - Please identify the new operator.

Name: \_\_\_\_\_

Address: \_\_\_\_\_ City & State \_\_\_\_\_ Zip \_\_\_\_\_

**NO** - Please check one reason which applies.

Retail Sales Only

New operation with no 1998 sales.

Other [*Explain*] \_\_\_\_\_



<b>SECTION 4 - SURVEY RESULTS</b>
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5. Would you like to receive a copy of the results of this survey? - **YES** - **NO**

If additional help is needed, please call: 1-800-338-2157

In Portland area please call: 326-2131

COMMENTS	OFFICE USE
	099
	910
	920

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Prepared by: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Date: \_\_\_\_\_

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